Evaluating Performance and Preparing Performance Narratives Reference Guide

5 Step Process for Evaluating Performance and Preparing Performance Narratives		
1	*Set the Stage for Consistency and Fairness*	• *Review employee's performance objectives along with the definitions for applicable elements and standards.* • *Converse with other raters in your department and your reviewer to ensure you are all interpreting and applying the standards consistently across employees.* • *Participate in a rater consistency workshop within your work unit or organization.*
2	*Review Employee's Self-Report of Accomplishments*	• *Look for insights pertaining to the rating your employee feels he/she has earned.* • *Note accomplishments your employee may have included that you didn't record in your own notes.* • *Determine if it might be helpful in providing a structure for your narrative.*
3	*Review your Notes*	*Consider your employee's performance and results, including:* • *Positive and negative examples, where appropriate.* • *Examples that occurred throughout the rating period.* • *Examples from the current rating period only.*
4a	*Assign a Rating*	*…for an Element:* • *Review Performance Objectives and Element Rating Descriptors job aid.* • *Review IC Performance Standards guide and the performance indicators to determine the appropriate rating.* *…for a Performance Objective:* • *Review Performance Objectives and Element Rating Descriptors job aid.* • *Review Ratings and General Standards job aid.* *…for Ratings Below the Successful Level:* • *Notify employee immediately if performance falls below Successful level.* • *Provide documentation that supports and justifies the rating in the employee's file.* • *Work with the employee to establish an improvement plan.*
4b	*Write a Narrative*	• *Focus on concrete job behaviors and performance results, not impressions.* • *Provide specific, relevant details to justify and support the ratings given.* • *Include sufficient details such that a third party would understand the reasons for the ratings.*
5	*Check for Accuracy and Clarity*	• *Ensure the narrative is unbiased.* • *Check the narrative for grammatical errors.*

Evaluating Performance and Preparing Performance Narratives Reference Guide (cont'd)

Common Rating Errors

Error	Definition	How To Avoid
Central Tendency	*Giving average ratings to all individuals, despite differences in their performance.*	*Remember that individuals perform differently. To be fair and accurate, your ratings need to reflect these differences.*
Contrast	*Basing ratings of an individual as compared to others, rather than on the performance standards.*	*Ensure that assigned ratings are based on performance standards, not relative comparisons between employees.*
First Impression	*Basing ratings on performance exhibited early on rather than on performance exhibited throughout the cycle.*	*Consider performance from the entire performance cycle, not just first impressions.*
Halo	*Basing ratings on an overall impression (either positive or negative) rather than on performance relative to each performance area.*	*Evaluate an individual's performance in each rating area separately. Don't let performance in one area influence your ratings of other areas.*
Leniency	*Giving unnecessarily lenient (or harsh) ratings.*	*Carefully read the performance standards and work with other managers to ensure you are applying them*
Recency	*Basing ratings on recent performance rather than on performance exhibited throughout the cycle.*	*Consider performance from the entire performance cycle, not just recent events. Keep notes of critical performance incidents throughout the year so your final rating accurately reflects them.*
Overemphasizing Positive or Negative Performance	*Relying too heavily on either positive or negative aspects of performance when assigning ratings.*	*Equally consider all aspects of an employee's performance, both positive and negative. Raters tend to consider positive performance to a much greater extent than negative performance, resulting in a higher rating than earned.*
Stereotyping	*Basing ratings on individual's membership (e.g., ethnicity, gender, religion) rather than on performance.*	*Be aware of the stereotypes that you hold about different groups and ignore your stereotypes when assigning performance ratings.*
Similar to Me	*Assigning higher ratings because someone is similar to you*	*Ignore any similarities or differences you may have with particular individuals. Focus on examples of performance relevant to the standards when you make your ratings.*